Job Aid:
How to Create a Bid from Scratch

This Job Aid shows how to:

- Create a Bid from Scratch in COMMBUYS

Of Special Note:

Bids are documents used to request price quotes and post opportunities for contracts from potential vendors for goods or services; used when goods or services are not already on a contract (statewide or departmental). Bids can either be a one-time request for goods and services, which would turn into an open market purchase order, or they can become a Master Blanket Purchase Order in COMMBUYS (formerly known as a contract or Master Agreement). They can also become a SWC (Statewide Contract) or Departmental Contract. This job aid will start at the point of creating a new bid, without a Requisition. Please review OSD policy if you have any questions.

Bid Types:

Open: Allows any vendor to submit a response, even vendors not originally notified of the Bid upon posting on COMMBUYS. Open Bids should be used for all procurements unless they fall into one of the situations where a Closed Bid is appropriate
- **Unrestricted**: Default on the Bidders tab
  - Visible externally and open to all vendors for response
- **Restricted**: User must make this selection on the Bidders tab
  - Visible externally but displays security message when viewer not logged in

Closed: User must make this selection on the General tab. Appropriate only in limited circumstances when a public bid is not required. For example, this option is appropriate for issuing bids (Requests for Quotes) against Statewide and Departmental Contracts, where the pool of eligible vendors is already established
- This selection does not show externally, but is visible only to selected vendors when they are logged in

Formal: Bids are "formal" by default and maybe either Open or Closed. Formal bids are used for all procurements unless they fall into one of the situations where an Informal Bid is appropriate. Formal Bids with multiple awards result in "Open Enrollment" Qualified Contractor Lists, as described in How to Draft a Request for Response.
- Default on the Vendor tab. No action is required to make a Bid formal.
- Prohibit Basic Purchasing users from viewing any submitted responses until the Opening Date/Time has been reached

Informal: Can be either Open or Closed. Appropriate only in limited circumstances for issuing bids (Requests for Quotes) against Statewide and Departmental Contracts to establish "Rolling Enrollment" Qualified Contractor Lists, as described in How to Draft a Request for Response.
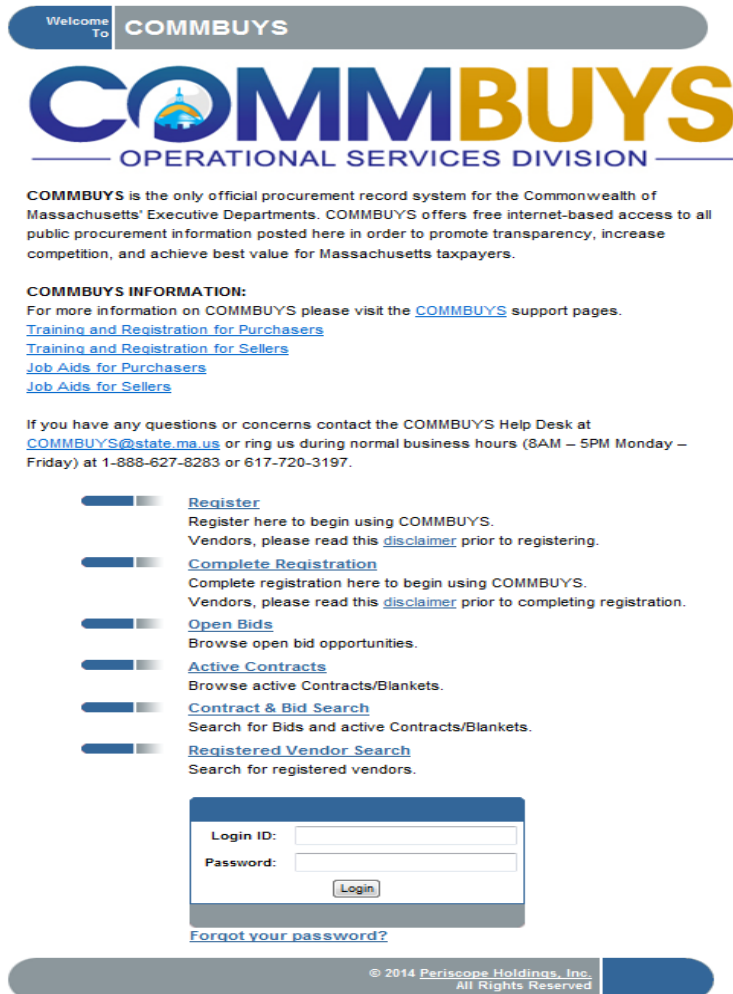- Allow "Purchaser" to view vendor responses prior to the Opening Date/Time

OSD
OPERATIONAL SERVICES DIVISION

Job Aid:
How to Create a Bid from Scratch

Screenshot	Directions
Welcome To COMMBUYS **COMMBUYS** **OPERATIONAL SERVICES DIVISION** **COMMBUYS** is the only official procurement record system for the Commonwealth of Massachusetts' Executive Departments. COMMBUYS offers free internet-based access to all public procurement information posted here in order to promote transparency, increase competition, and achieve best value for Massachusetts taxpayers. **COMMBUYS INFORMATION:** For more information on COMMBUYS please visit the COMMBUYS support pages. Training and Registration for Purchasers Training and Registration for Sellers Job Aids for Purchasers Job Aids for Sellers If you have any questions or concerns contact the COMMBUYS Help Desk at COMMBUYS@state.ma.us or ring us during normal business hours (8AM – 5PM Monday – Friday) at 1-888-627-8283 or 617-720-3197. **Register** Register here to begin using COMMBUYS. Vendors, please read this disclaimer prior to registering. **Complete Registration** Complete registration here to begin using COMMBUYS. Vendors, please read this disclaimer prior to completing registration. **Open Bids** Browse open bid opportunities. **Active Contracts** Browse active Contracts/Blankets. **Contract & Bid Search** Search for Bids and active Contracts/Blankets. **Registered Vendor Search** Search for registered vendors. Login ID: [____] Password: [____] [Login] Forgot your password? © 2014 Periscope Holdings, Inc. All Rights Reserved	1. Launch the COMMBUYS website by entering the URL https://www.commbuys.com/bso/ in the Browser Enter your Login ID and Password

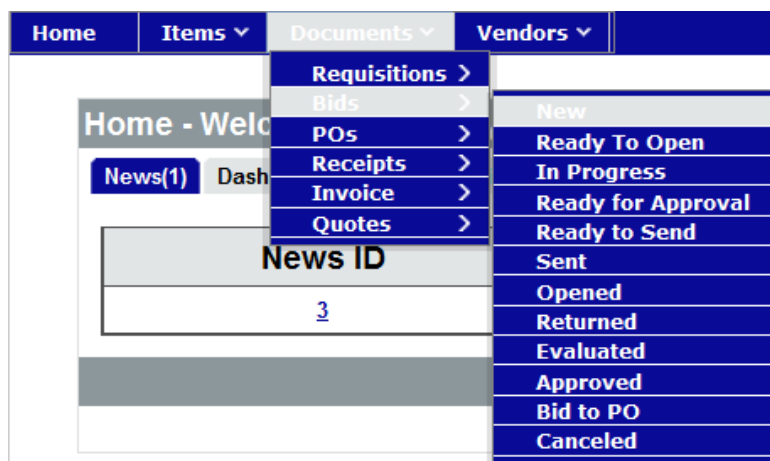|	
Basic Purchasing	**Inquiry**
January 6, 2014 6:24:20 PM EST	2. Upon successful login, select the **Basic Purchasing** role on the upper right side of the page if not selected already. Note: If you only have one user role, Basic Purchasing, no tabs display.

3. From the Navigation Bar, select **Documents > Bids > New**

As a general rule, Policy directs users to start transactions with a requisition.

Home | Items ∨ | Documents ∨ | Vendors ∨

Requisitions >
Bids >
POs >
Receipts >
Invoice >
Quotes >

New
Ready To Open
In Progress
Ready for Approval
Ready to Send
Sent
Opened
Returned
Evaluated
Approved
Bid to PO
Canceled

Home - Welc
News(1) Dash
News ID
3

4. Click on **Create a bid from scratch** radio button

Click the **Continue** button.

Create a New Bid

Please select the method to create a new bid:

- ⦿ Create a bid from scratch.
- ○ Clone a bid from another document.
- ○ Copy Contracts For Renewal.

[Continue] [Cancel & Exit]

5. Shown here is the left half of a New Bid General tab. The **General** tab contains the overall header information for the document.

COMMBUYS will generate a BID number after you save your information on the General tab.

Mandatory fields for the left side of a BID:
- **Department**: select from the department from dropdown, if not automatically populated
- **Location**: select from the location dropdown; if not automatically populated
- **Available Date:** date the bid will be viewable on COMMBUYS
- **Purchase Method** (dropdown): select from the dropdown
  - **Open Market** – one time bid
  - **Contract** – do not use
  - **Blanket** – results in a contract (departmental or statewide)
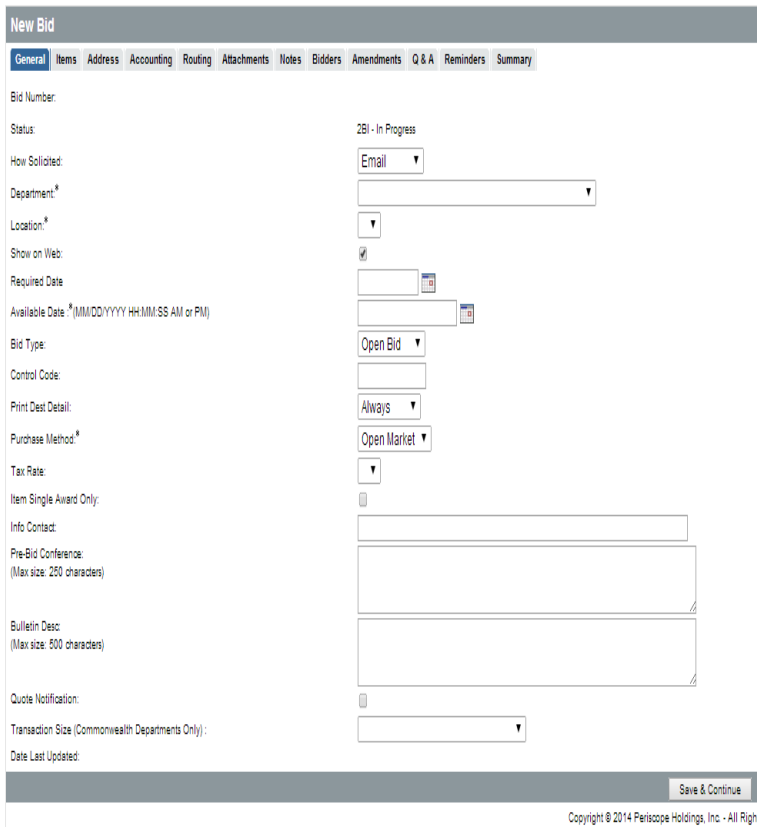
Mandatory fields for Blanket (contract):
- **Purchase Method:** dropdown; if Blanket is selected, two additional fields requiring input populate:
  - **Blanket Begin Date**: beginning date of the blanket, use the calendar icon to select date
  - **Blanket End Dates**: blanket end date, use the calendar icon to select date

Optional fields:
- **How Solicited:** do not touch
  - Email (default)
- **Show on Web**: controls if the bid displays and is searchable in COMMBUYS – always be checked
- **Required Date**: use calendar icon to select the date the commodity or service is required; can also be left blank
- **Bid Type**: defaults to open; dropdown
  - **Open** – available for all Vendors to view and respond
  - **Closed** – only selected Vendors on the Bid can view and respond
- **Control Code**: leave blank
- **Print Dest Detail**: leave blank
- **Tax Rate**: n/a for Commonwealth
- **Item Single Award Only**: leave unchecked
- **Info Contract**: editable field; input the name of the person for Vendor's contact if it differs from the purchaser

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New Bid

General | Items | Address | Accounting | Routing | Attachments | Notes | Bidders | Amendments | Q & A | Reminders | Summary

Bid Number:

Status: 2BI - In Progress

How Solicited: Email ▼

Department: * [▼]

Location: * [▼]

Show on Web: ☑

Required Date:

Available Date: * (MM/DD/YYYY HH:MM:SS AM or PM)

Bid Type: Open Bid ▼

Control Code:

Print Dest Detail: Always ▼

Purchase Method: * Open Market ▼

Tax Rate: [▼]

Item Single Award Only: ☐

Info Contact:

Pre-Bid Conference: (Max size: 250 characters)

Bulletin Desc: (Max size: 500 characters)

Quote Notification: ☐

Transaction Size (Commonwealth Departments Only): [▼]

Date Last Updated:

Save & Continue

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- **Pre-Bid Conference**: 250 character field to capture BID conference information – if applicable
- **Bulletin Desc:** brief description of Bid
- **Quote Notification:** check box to receive notifications of incoming quotes
- **Transaction Size**: choose from the dropdown (large or small procurement)

Click the **Save & Continue** button when finished.
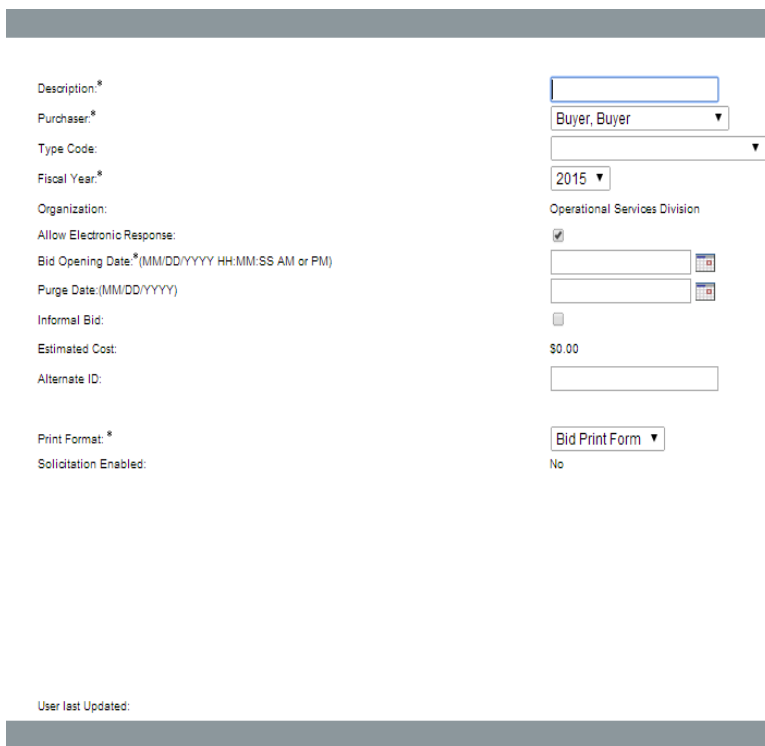
6. **Mandatory fields for the right side of a BID:**
- **Description:** is a searchable field; please enter short bid description (option to use agency's Bid numbering schema)
- **Purchaser**: defaults to designated purchaser
- **Fiscal Year**: will auto populate but can be changed
- **Bid Opening Date**: use the calendar icon to select the scheduled date to open the bid for review and award, which closes the bid to vendors. COMMBUYS will no longer accept quotes for that Bid and the Buyer is able to open and view quotes.
- **Print Format**: only one option; ignore

Optional Fields:
- **Type Code:** dropdown; only use the two options below
  - SS – Statewide Solicitation (only authorized SW contracts)
  - NS – Non-Statewide Solicitation
- **Purge Date**: **DO NOT use**
- **Informal Bid (check box)**: if selected, you can view the submitted vendor quotes before bid opening date but cannot award them
- **Alternate ID**: leave blank

Description:*
Purchaser:* Buyer, Buyer
Type Code:
Fiscal Year:* 2015
Organization: Operational Services Division
Allow Electronic Response: ☑
Bid Opening Date:*(MM/DD/YYYY HH:MM:SS AM or PM)
Purge Date:(MM/DD/YYYY)
Informal Bid: ☐
Estimated Cost: $0.00
Alternate ID:
Print Format: * Bid Print Form
Solicitation Enabled: No

User last Updated:

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257

General | Items | Address | Accounting | Routing | Attachments | Notes | Bidders | Questions | Amendments | Q & A | Reminders | Summary

General Validation Errors

• No Items.

7. COMMBUYS assigns a Bid number and generates General Validation Errors (in Red) of 'No Items'

Click the **Items** tab remove the error message and to add items to the bid

8. Click the **Add Items** Button to add item/services to the Bid

9. Input the item information. Major fields on this page include:

- **Print Sequence*** – value defaults
- **Description*** – enter complete description of good or service; be as specific as possible
- **Quantity** – enter quantity (must be at least 1)
  o If bid is for a specific number enter that quantity; if unknown enter 1
- **Unit Cost** – N/A, unless known then enter a cost
- **UNSPSC** –set of codes that classify goods and services into standardized groups; use the drop down or eye glass icon to search for the most relevant code (see step 10)
  o Segment/Family
  o Class
- **Other Product Information** – these fields are optional

10. After clicking the eyeglass icon, the Search Code screen populates.

The Search Code screen populates, use the available search dropdowns and fields to find the best code. Select the radio button on the left side of the screen to choose the best code and click the **Save & Exit** to return to the Items tab.

Add as many items as required for the Bid, by clicking **Save & Add New**. Click the **Save & Exit** button once finished with all required bid items and the **Items General** tab redisplays.

Click the **Address** tab to continue once all items are added.

11. Click the **Address** tab to continue the bid.

Review the Ship-to and Bill-to Addresses. Click the Eyeglass icon to add or change either address.

Note: Organization Administrators maintain the Ship-to and Bill-to addresses. To update or add additional addresses, contact the OA

12. The Lookup Ship-to Address window displays. Input the search criteria and click **Find It**.

If no criterion is entered all possible addresses for the Organization will appear by clicking **Find It**.

13. The search results display. Check the **Select** radio button adjacent to the address you would like to select.

Click the **Select** button at the bottom of the page.

14. The search page closes and the selected address populates the Ship-to Address.

Click **Save & Continue.**

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 — Status: 2BI - In Progress General Items Address Accounting Routing **Attachments** Notes Bidders Questions Amendments Q & A Reminders Summary **Files** ⓘ Click **Add File** to add file attachments. No File Attachments **Forms** ⓘ Click **Add Form** to add form attachments. No Form Attachments [Add File] [Add Form] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	15. Click the **Attachments** tab. The **Attachments** tab displays. Attachments include bid attachments and required forms/contract documents Click the **Add File** button to add a new file. **Note:** Add Form is not currently a working function in COMMBUYS
Add File ⓘ **Name** is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric ch Name*: sample attachment.docx Description: [ ] File*: C:\My Files\1 - Commonwealth of Massachusetts\1 - Training\Traini [Browse...] Location: agency [Save & Exit] [Save & Continue] [Reset] [Cancel & Exit]	16. The Add File window opens. Complete the following fields: • **Name** – required; but will be populated with the file name if left blank • **Description** - optional Click **Browse** to select a file. Click **Save & Continue** to add another file or click **Save & Exit** when all files have been added.
Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257 — Status: 2BI - In Progress General Items Address Accounting Routing **Attachments(1)** Notes Bidders Questions Amendments Q & A Reminders Summary **Files** 	Name	Description	Show Vendor	Attached By	Attached Date	Delete
---	---	---	---	---	---
Tulips.jpg	Test	☑	Buyer Buyer	08/21/2014	☐ | **Forms** ⓘ Click **Add Form** to add form attachments. No Form Attachments [Save & Continue] [Add File] [Add Form] Copyright © 2014 Periscope Holdings, Inc. - All Rights Reserved.	17. The Attachments tab redisplays with the new file attached.
General Items Address Accounting Routing Attachments(2) **Notes** Bidders Questions Amendments Q & A Reminders Summary 	Delete ☐	Note Date	User	Note
---	---	---	---
			Sample Note.	 [Save & Continue] [Reset]	18. Click the **Notes** tab (this is an optional tab). Add any text or note in the Note box. Notes are viewable only by Commonwealth users. Vendors cannot access or view these notes. When complete, click **Save & Continue**.

19. Click the **Bidders** tab.

In general, a bid (RFR) should be open to all, which would be unrestricted.

Several options can be set on the Bidders tab:
- **Select bidder participation**
  - **Unrestricted** – any vendor can respond to the bid
  - **Restricted** – only listed vendors can respond to the bid
- **Show the Unit Price to Vendors** – when unchecked (default) bidders cannot see the unit price for bid items
- **Hide Bid Holder List on Vendor Side** – when checked (default), bidders cannot see who has responded to the bid

Click **Lookup & Add Vendors**.

20. The Lookup and Add Reference Vendors screen displays.

Scroll to bottom of the screen and select **Find Vendors for All Commodity-EPPS on the Bid** button. The results will display with the Vendors who selected the same commodity code as the bid item(s).

COMMBUYS automatically matches the vendors who have correctly registered with UNSPSC codes; these vendors will receive an email notification of the Bid.

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Select ☐	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
☐	201987	O'Connor & Drew, PC				25 Braintree Hill Park Suite 102	Braintree	MA	David Dilulis	6174711120	No
☐	211456	Revenue Solutions, Inc.				2000 Opportunity Drive Suite 100	Roseville	CA	Jeff Huber	9167808741	No
☐	00000514	The Parris Company, Inc.				PO Box 51501	Boston	MA	Mischa Parris	(781)519-9829	No

| Save & Exit | Save & Continue | Find Vendors for All Commodity-EPPs on the Bid | Close Window |

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Message from webpage ⊠

⚠ Warning: All vendors have been selected for email notification. A large quantity of vendors may take several minutes to process.

[OK]

21. Click the top Select checkbox to select all the Vendors.

Buyers can also add vendors by name and also use the other search parameters listed, SDO, SBPP, etc.

A popup window displays with a Warning Message when selecting a large number of vendors.

Click **OK**. The popup window will disappear and all information populates in the bid.

Click **Save & Exit** to return to the Vendors tab

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000257   Status: 2BI - In Progress 📄

General | Items | Address | Accounting | Routing | Attachments(1) | Notes(1) | **Bidders** | Questions | Amendments | Q & A | Reminders | Summary

General | Subcontractors | Quote Activity

Select bidder participation, open or closed, and select vendors to notify

○ Unrestricted bid, all vendors can view and respond

○ Restricted bid, only selected vendors can view and respond

Delete ☐	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method
☐	00000051	RR Donnelley	Bid Mailing Address: Add New Address General Mailing Address - Susan Sheridan 400 Blue Hill Drive Su... ▾ 400 Blue Hill Drive Suite 100 Westwood, MA 02090 US	Paper Copy Mailed
☐	4503	New England Office Supply (NEOS) (MWBE)	Bid Mailing Address: Add New Address General Mailing Address - Patricia Vacca 135 Lundquist Dr Braintre... ▾ 135 Lundquist Dr Braintree, MA 02184 US	Paper Copy Mailed
☐	4951	Muratec America, Inc	Bid Mailing Address: Add New Address General Mailing Address - Jerry Roberts 3301 E. Plano Parkway, Ste... ▾ 3301 E. Plano Parkway, Ste #100 Plano, TX 75074	Paper Copy Mailed

☐ Show Unit Prices to Vendors

☑ Hide Bid Holder List on Vendor Side

ⓘ Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

| Save & Continue | Lookup & Add Vendors |

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22. The **Vendors tab** will now display all the Vendors you selected

Buyers should see email as the preferred method of delivery.

Click **Lookup & Add Vendors** multiple times to ensure that vendors with different commodity codes relevant for your bid are included, by entering the criteria in the search field. Be as broad as possible to select all possible vendors.

COMMBUYS will create a combined notification list of all vendors you select through multiple vendor searches. If a vendor appears multiple times, COMMBUYS will keep the company on the list once to avoid duplicate notification.

23. Click the **Questions** tab (this is an optional tab)

The **Questions** tab allows you to create questions for the vendor to answer with a supplied response type. You can make these questions a required response by checking the Required box.

To change the **Response Type**, chose from the available dropdown options.

Once all questions are entered, click **Save & Continue.**

24. Click the **Q&A** tab (this is an optional tab). The Q&A tab is a way for vendors and the Commonwealth to dialog within the bid.

This feature is only usable before the bid opening date; however, the questions and answers remain viewable after the bid is opened.

In addition to adding the questions, there are two options on this page:
- **Allow Vendor to submit questions** – make sure to check if questions are allowed for the bid
- **Send notification when vendor sends question** – use if you want notifications of questions sent in COMMBUYS
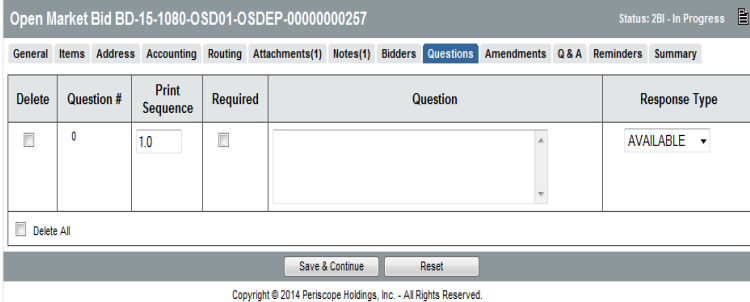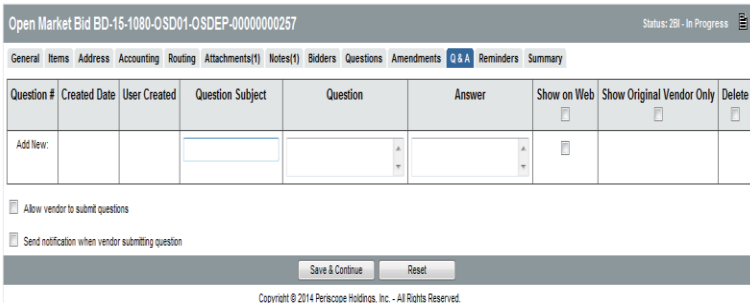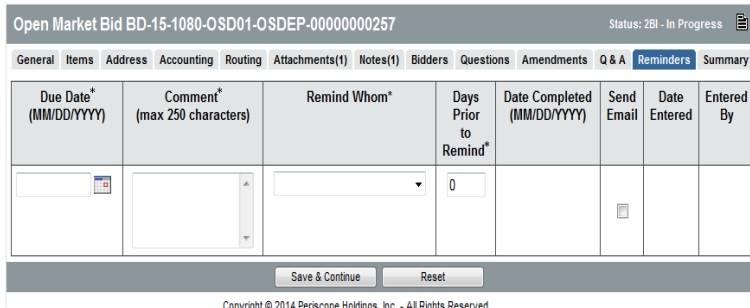
Click **Save & Continue** after entry of each question.

25. Click the **Reminders** tab (this is an optional tab)

To create a reminder, input the information on the **Reminder** tab including:
- Due Date
- Comment
- Remind Whom
- Days Prior to Remind
- Send Email

When the reminder is sent, the tab updates with the Date Completed.

26. Click the **Summary** tab.

The **Summary** tab provides a recap of the bid information. Shown here is the upper part of the Summary tab.

27. Shown here is the lower part of the **Summary** tab that provides a summary of each item on the bid as well as the action buttons currently available for the bid:

- **Submit for Approval**
- **Cancel Bid**
- **Clone Bid**
- **Print**

After reviewing the information, click the **Submit for Approval** button to submit the bid into workflow for approval routing.

Skipped Tabs:
- **Accounting**: Phase II
- **Routing**: populates after submission for approval

28. A Popup message displays stating 'Are you sure you want to submit this bid?'

Click **OK** to continue with the submission. To cancel the submission, click **Cancel**.
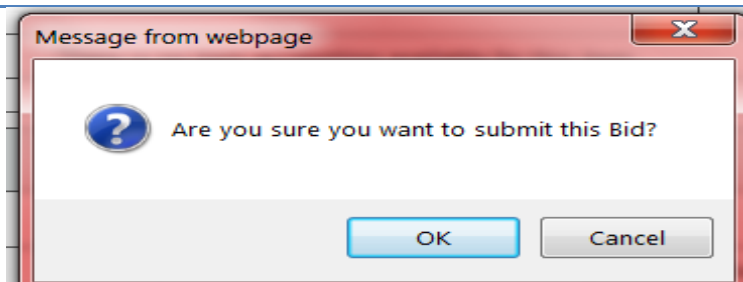
29. The **Summary** tab redisplays showing a status of **Ready for Approval**.

30. Once the bid is approved, the bid's status will update in your Control Center The status will change from **Ready for Approval** to **Ready to Send**.

Click the blue hyperlink **Bid #** to open the bid.

31. The bid opens to the **Summary** tab. Scroll to the bottom of the page.

Under Send Bid Actions, Select either the RADIO button option :

- **Change bid status to 'Sent" and notify Vendor** - general rule to send email
- **Change bid status to "Sent' only** – posts the Bid on COMMBUYS but does not send an email notification to the selected bidders.

Click on **Send Bid** button.

The bid is now posted on COMMBUYS, Vendor may be able to respond depending on the available date set on the General tab